



Demo Script: **Customer 360 Dashboard using SAP Analytics Cloud**

SCENARIO ID: 17913

COMMUNITY CONTENT NAME: SAP_CC_CUSTOMER 360

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1. DEMO SCRIPT OVERVIEW

1.1 Highlights

The Customer 360 Dashboard is created in SAP Analytic Cloud by combining the data from C4C, S/4HANA, and Qualtrics. It connects the marketing, sales, commerce, and service teams together with a single view of your customer data, helping grow relationships with your customer. This demo includes three customer-360 dashboards in total, covering from ToB to ToC business. They are embedded into the C4C system, users could directly access these analytical dashboards while browsing in C4C, which not only enriches the customer information but also gives easy access to check while exploring potential opportunities and upcoming tasks.

Note: This demo is currently based on offline datasets without technical data integration with other systems.

1.2 Why now?

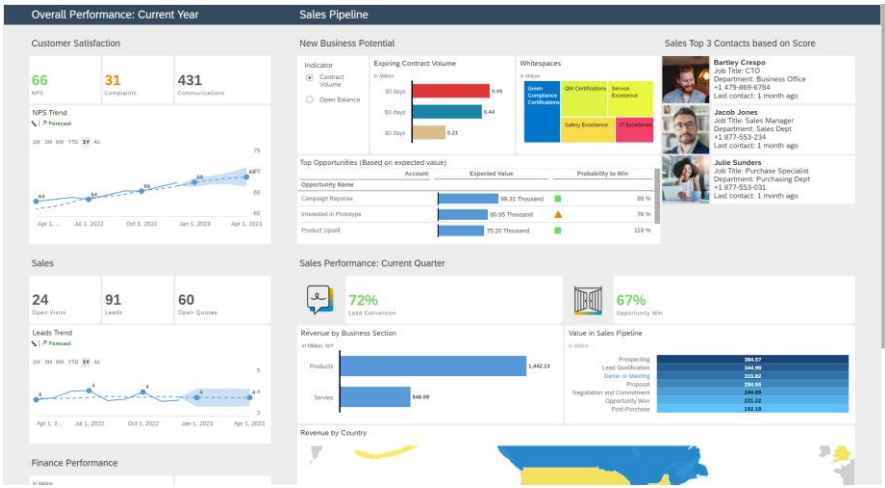
Today organizations are accumulating exponentially larger volumes of customer data, and it often becomes fragmented, duplicated, inconsistent, incomplete, and out-of-date as it travels throughout the organization. The Customer 360 Dashboard is designed to provide holistic insight for the salesperson to better understand their customers for increasing revenue, reducing costs, identifying inefficiencies, and improving the customer experience.

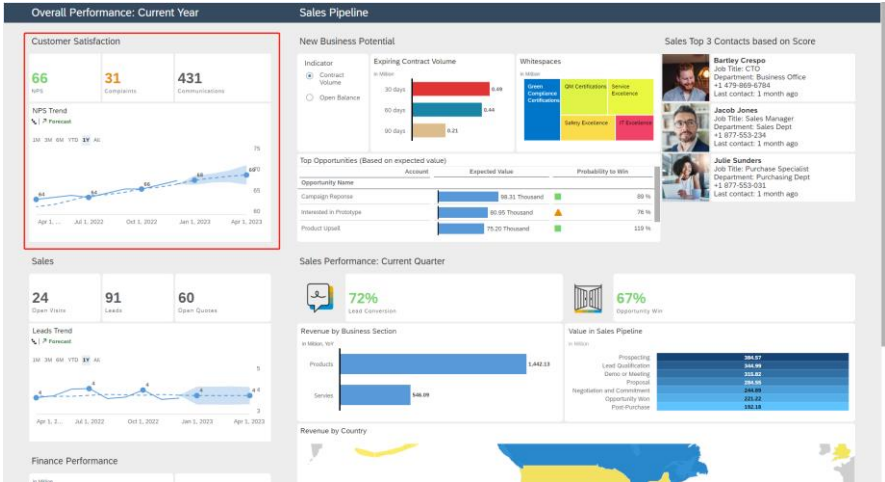
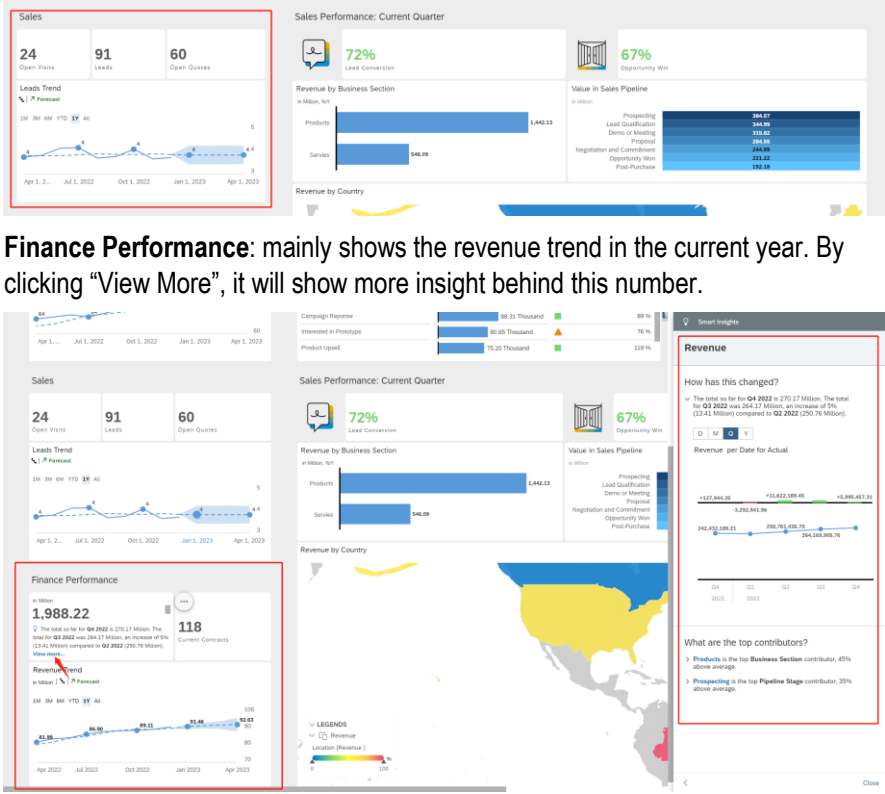
1.3 Why SAP?

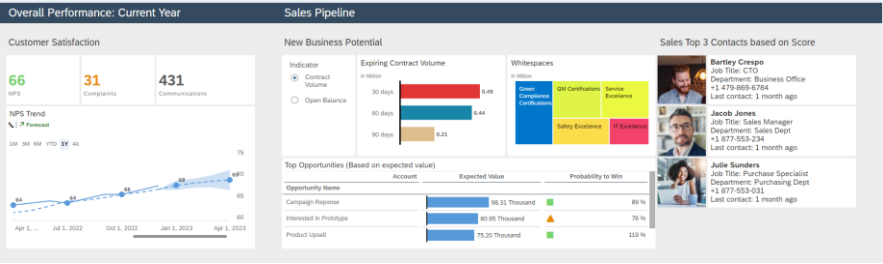
SAP Analytics Cloud, or SAC, provides augmented analysis helping get insights from their customers. An Intelligent enterprise can obtain a high-level indication of how their business is performing with their customers and be able to drill down into the details to get insight. To take the proper action, the key decision makers also must perform simulations and analysis to help guide their partners strategically.

2 DEMO SCRIPT


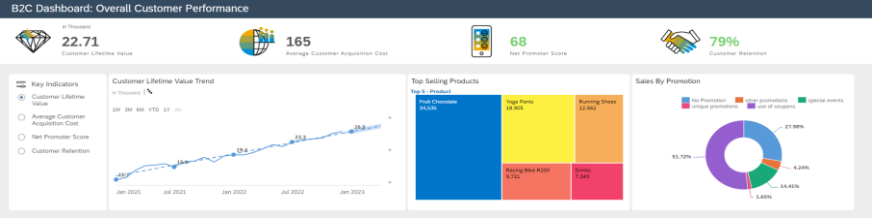
2.1 B2B Dashboard

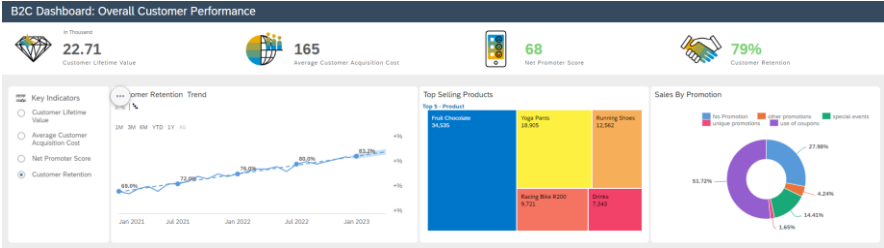
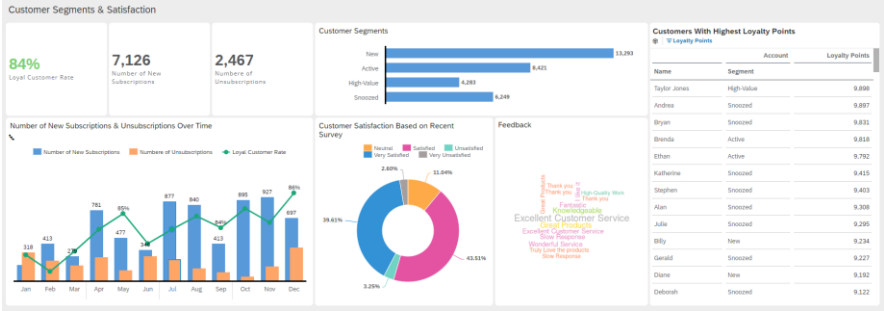
	Actions	Screenshots and Explanation
1.	<ul style="list-style-type: none"> Introduce the purpose of this B2B Dashboard 	<p>This Customer 360 B2B Dashboard is designed to provide a holistic view for a specific customer. The link to this dashboard is embedded into the C4C system. When clicking this specific customer in C4C, it will open this story and provide the users with a customer 360 view.</p> <p>This dashboard contains two sections.</p> <ul style="list-style-type: none"> Overall Performance: displays the key performance indicators at the current year from customer satisfaction, sales, and finance performance perspectives. Sales Pipeline: indicates the new business potential, and deeply explores the sales performance in the current quarter. 
2.	<ul style="list-style-type: none"> Introduce Overall Performance Part. 	<p>Looking at this dashboard, I firstly want to check our overall performance towards this specific customer. In this part, I could check from three aspects, which are customer satisfaction, sales, and financial performance.</p> <p>Customer Satisfaction: three key indicators are listed here. The color of NPS is green, which indicates the great message of customer satisfaction. However, the cumulative complaint of this year is 31, which shows a warning message. We need to put more effort into decreasing complaints to improve customer satisfaction. Below, I could also check the NPS trend over time. The embedded machine learning algorithm predicts the future trend to give further insight.</p>

	Actions	Screenshots and Explanation
		 <p>Sales: similar to customer satisfaction, three KPIs (open visits, leads, open quotes) are listed to help me understand the current sales situation. By looking at these KPIs, the sales activities are working great with reasonable open visits, leads, and quotes.</p> <p>Finance Performance: mainly shows the revenue trend in the current year. By clicking "View More", it will show more insight behind this number.</p> 
3.	<ul style="list-style-type: none"> Introduce Sales Pipeline Part. 	<p>This part puts more focus on finding potential business opportunities and reviewing the sales process.</p> <p>New Business Potential: I could check the expiring contract volume in 30, 60, and 90 days, so that to take immediate necessary actions. Besides, a few whitespaces have been estimated based on our corporation with this customer.</p>

	Actions	Screenshots and Explanation
		<p>Sales Top 3 Contacts based on Score: in the last part of this dashboard is the top 3 sales contacts based on relationship intelligence score.</p>  <p>The screenshot displays a B2B dashboard with several key sections: <ul style="list-style-type: none"> Overall Performance: Current Year: Shows metrics like 66 NPS, 31 Complaints, and 431 Communications. Sales Pipeline: Includes a bar chart for 'Expanding Contract Volume' and a table for 'Top Opportunities (Based on expected value)'. Customer Satisfaction: Features a line chart for 'NPS Trend'. Sales Top 3 Contacts based on Score: Lists three contacts: Bartley Crespo, Jacob Jones, and Julie Summers, each with their job title, department, and last contact date. </p>

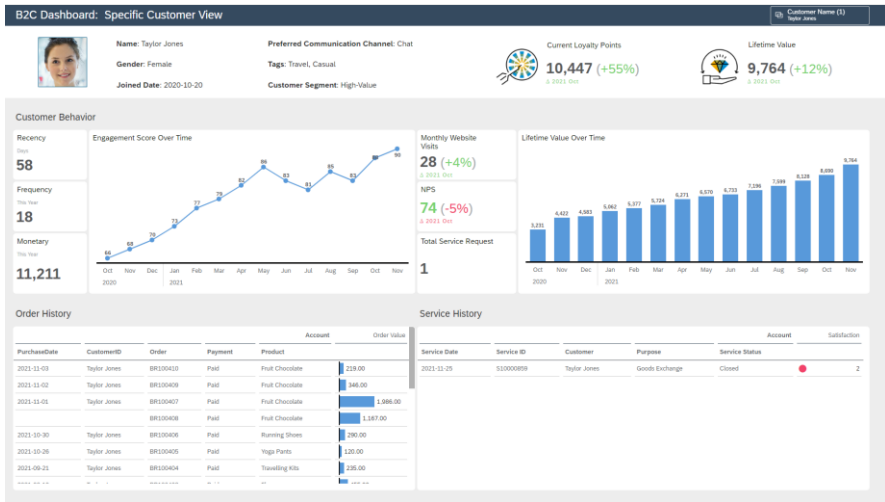
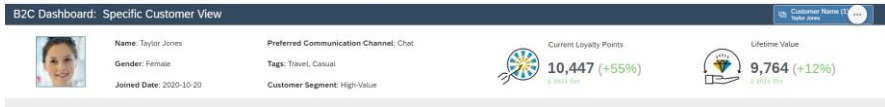
2.2 B2C Dashboard: Overall Performance



	Actions	Screenshots and Explanation
1.	<ul style="list-style-type: none"> Introduce the charts on the B2C Dashboard: Overall Customer Performance. 	<p>Now I am moving to B2C Dashboard for the overall customer performance. The previous B2B dashboard is built for ToB business, while this dashboard is designed for delivering ToC business like running an online shopping website. It provides the overall performance check for all customers.</p>  <p>The screenshot displays a B2C dashboard titled 'B2C Dashboard: Overall Customer Performance'. It features several key sections: <ul style="list-style-type: none"> Key Indicators: Shows four main metrics: Customer Lifetime Value (22.71), Average Customer Acquisition Cost (165), Net Promoter Score (68), and Customer Retention (79%). Customer Lifetime Value Trend: A line chart showing the trend from Jan 2021 to Jan 2023. Top Selling Products: A bar chart showing the top products and their sales. Sales By Promotion: A donut chart showing the distribution of sales by promotion type. Customer Segments & Satisfaction: Includes a bar chart for 'Customer Segments' and a line chart for 'Number of New Subscriptions & Unsubscriptions Over Time'. Customer Satisfaction Based on Recent Survey: A donut chart showing the distribution of satisfaction levels. Customers With Highest Loyalty Points: A table listing the top customers and their loyalty points. </p>
2.		<p>On the top area, I can see four important indicators: customer lifetime value, average customer acquisition cost, net promoter score, and customer retention. Overall, it performs great.</p>  <p>This screenshot focuses on the top section of the B2C dashboard, highlighting the four key indicators: <ul style="list-style-type: none"> Customer Lifetime Value: 22.71 Average Customer Acquisition Cost: 165 Net Promoter Score: 68 Customer Retention: 79% </p>

Actions	Screenshots and Explanation
<ul style="list-style-type: none"> Select “Customer Retention” at the left input control. 	<p>By selecting different indicators in the left input control panel, I could check the selected indicator trend over time. For example, if I choose “Customer Retention”, the right line chart will change automatically to show the trend of customer retention. It shows an overall upward trend and predicts the values for the next three months.</p>  <p>Next to the line chart, I could see the top products based on selling amount in a certain period. It demonstrates Fruit Chocolate has the highest selling amount and followed by Yoga Pants and Running Shoes. The beside pie chart shows the sales amount by promotion, indicating “use of coupons” is the most efficient way to promote the purchase.</p>
<ul style="list-style-type: none"> Introduce the part “Customer Segments & Satisfaction” in B2C Dashboard. Click “Very Unsatisfied” in the pie chart. 	<p>The second part of this dashboard focuses on customer segments and satisfaction. On the right side, I can first see the number of customer changes over time. Then a bar chart in the middle displays the segments for current customers. There are over 6 thousand snoozed customers that may need our attention to recall in the next marketing activity.</p>  <p>The result of a recent survey based on purchase experience is also included in this dashboard. The pie chart shows the satisfaction distribution. It seems overall our customers are satisfied with our product and service. However, there are still a few unsatisfied cases that need to pay more attention to. By clicking the “Very Unsatisfied”, the right word cloud will change to show the specific feedback. Based on the feedback, I may give the suggestion to the service team to faster the process of response.</p>

Actions		Screenshots and Explanation
		<div><div><div><div><div>Customer Segments & Satisfaction</div><div><div>84%</div><div>Loyal Customer Rate</div></div><div><div>7,126</div><div>Number of New Subscriptions</div></div><div><div>2,467</div><div>Number of Unsubscriptions</div></div></div><div><div>Number of New Subscriptions & Unsubscriptions Over Time</div><div><div>Number of New Subscriptions</div><div>Number of Unsubscriptions</div><div>Loyal Customer Rate</div></div><div><div>Jan</div><div>Feb</div><div>Mar</div><div>Apr</div><div>May</div><div>Jun</div><div>Jul</div><div>Aug</div><div>Sep</div><div>Oct</div><div>Nov</div><div>Dec</div></div><div><div>128</div><div>413</div><div>781</div><div>477</div><div>877</div><div>842</div><div>413</div><div>935</div><div>927</div><div>887</div></div><div><div>83%</div><div>Loyal Customer Rate</div><div>Based on Recent</div><div>Date: 2022/02/01</div><div><div>Satisfied</div><div>Unsatisfied</div><div>Very Unsatisfied</div></div><div><div>83.00%</div><div>15.00%</div><div>2.00%</div></div><div><div>Based Experience</div><div>Slow Response</div></div></div><div><div>Customer Segments</div><div><div>New</div><div>Active</div><div>High Value</div><div>Snoozed</div></div><div><div>13,293</div><div>6,401</div><div>4,265</div><div>4,249</div></div></div><div><div>Customers With Highest Loyalty Points</div><div><div>Name</div><div>Segment</div><div>Account</div><div>Loyalty Points</div></div><div><div>Taylor Jones</div><div>High Value</div><div></div><div>9,898</div></div><div><div>Andrea</div><div>Snoozed</div><div></div><div>9,887</div></div><div><div>Bryan</div><div>Snoozed</div><div></div><div>9,831</div></div><div><div>Brenda</div><div>Active</div><div></div><div>9,818</div></div><div><div>Ethan</div><div>Active</div><div></div><div>9,792</div></div><div><div>Katherine</div><div>Snoozed</div><div></div><div>9,415</div></div><div><div>Stephen</div><div>Snoozed</div><div></div><div>9,403</div></div><div><div>Alan</div><div>Snoozed</div><div></div><div>9,308</div></div><div><div>Julie</div><div>Snoozed</div><div></div><div>9,295</div></div><div><div>Billy</div><div>New</div><div></div><div>9,234</div></div><div><div>Gerald</div><div>Snoozed</div><div></div><div>9,227</div></div><div><div>Diane</div><div>New</div><div></div><div>9,182</div></div><div><div>Deborah</div><div>Snoozed</div><div></div><div>9,122</div></div></div></div></div></div></div>

2.3 B2C Dashboard: Specific Customer View

Actions		Screenshots and Explanation	
1.	<ul style="list-style-type: none">open the dashboard B2C Dashboard for a specific customer view	<p>After reviewing the overall customer performance in the previous dashboard. I might want to check a specific customer view. The third dashboard is also designed for ToC business but focuses on delivering a specific customer view. This will help me trace a customer journey with us and provide better service.</p>	
2.	<ul style="list-style-type: none">Introduce the content on this dashboard	<p>By using the filter at the top area, I could switch to different customers to check their customer journey. By default, we set it to show Taylor Jones' profile. I could see Taylor is our high-value customer, joined on 20th Oct. 2020, with the tags of travel and causal.</p>	 <p>Applying the RFM model to analyze Taylor's behavior. It includes three factors, which are recency, frequency, and monetary, illustrates three facts:</p> <ul style="list-style-type: none">the more recent the purchase, the more responsive the customer is to promotionsthe more frequently the customer buys, the more engaged and satisfied they aremonetary value differentiates heavy spenders from low-value purchasers <p>Looking at the three factors, it all applies to the high-value segment standards. Her last time purchase is 58 days ago. This year he has 18 purchases with 11,211 money spent. On the right side, I could trace Taylor's monthly website visits, NPS scores and total service requests. This month's NPS is 74, which is 5% lower than the previous month. I may need to dig into her order and service history to check what's happened to lower this score.</p>

Actions	Screenshots and Explanation																																																																										
	<div><div><div><div><div>Customer Behavior</div><div><div>Recency Days 58</div><div>Frequency This Year 18</div><div>Monetary This Year 11,211</div></div><div><div>Engagement Score Over Time</div><div><div>Monthly Website Visits 28 (+4%)</div><div>NPS 74 (-5%)</div><div>Total Service Request 1</div></div><div><div>Lifetime Value Over Time</div></div></div></div></div><div><p>By checking her order and service history, I could see the most recent service request is for goods exchange, but the satisfaction score is low. I may need to further contact Taylor to collect feedback and send special coupons to improve her experience.</p></div><div><div><div>Order History</div><table><tr><th>PurchaseDate</th><th>CustomerID</th><th>Order</th><th>Payment</th><th>Product</th><th>Amount</th></tr><tr><td>2021-11-03</td><td>Aaron</td><td>BP1030430</td><td>Paid</td><td>Product 1</td><td>119.00</td></tr><tr><td>2021-11-02</td><td>Aaron</td><td>BP1030429</td><td>Paid</td><td>Product 1</td><td>149.00</td></tr><tr><td>2021-11-01</td><td>Aaron</td><td>BP1030407</td><td>Paid</td><td>Product 1</td><td>1,968.00</td></tr><tr><td></td><td></td><td>BP1030408</td><td>Paid</td><td>Product 1</td><td>1,287.00</td></tr><tr><td>2021-10-30</td><td>Aaron</td><td>BP1030406</td><td>Paid</td><td>Product 9</td><td>290.00</td></tr><tr><td>2021-10-29</td><td>Aaron</td><td>BP1030405</td><td>Paid</td><td>Product 6</td><td>120.00</td></tr><tr><td>2021-09-21</td><td>Aaron</td><td>BP1030404</td><td>Paid</td><td>Product 14</td><td>218.00</td></tr><tr><td>2021-09-19</td><td>Aaron</td><td>BP1030403</td><td>Paid</td><td>Product 7</td><td>409.00</td></tr><tr><td>2021-08-17</td><td>Aaron</td><td>BP1030402</td><td>Paid</td><td>Product 15</td><td>147.00</td></tr></table></div><div><div>Service History</div><table><tr><th>Service Date</th><th>Service ID</th><th>Customer</th><th>Purpose</th><th>Service Status</th><th>Account</th><th>Satisfaction</th></tr><tr><td>2021-11-25</td><td>010000059</td><td>Aaron</td><td>Goods Exchange</td><td>Closed</td><td></td><td>2</td></tr></table></div></div></div><div>11</div></div>	PurchaseDate	CustomerID	Order	Payment	Product	Amount	2021-11-03	Aaron	BP1030430	Paid	Product 1	119.00	2021-11-02	Aaron	BP1030429	Paid	Product 1	149.00	2021-11-01	Aaron	BP1030407	Paid	Product 1	1,968.00			BP1030408	Paid	Product 1	1,287.00	2021-10-30	Aaron	BP1030406	Paid	Product 9	290.00	2021-10-29	Aaron	BP1030405	Paid	Product 6	120.00	2021-09-21	Aaron	BP1030404	Paid	Product 14	218.00	2021-09-19	Aaron	BP1030403	Paid	Product 7	409.00	2021-08-17	Aaron	BP1030402	Paid	Product 15	147.00	Service Date	Service ID	Customer	Purpose	Service Status	Account	Satisfaction	2021-11-25	010000059	Aaron	Goods Exchange	Closed		2
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